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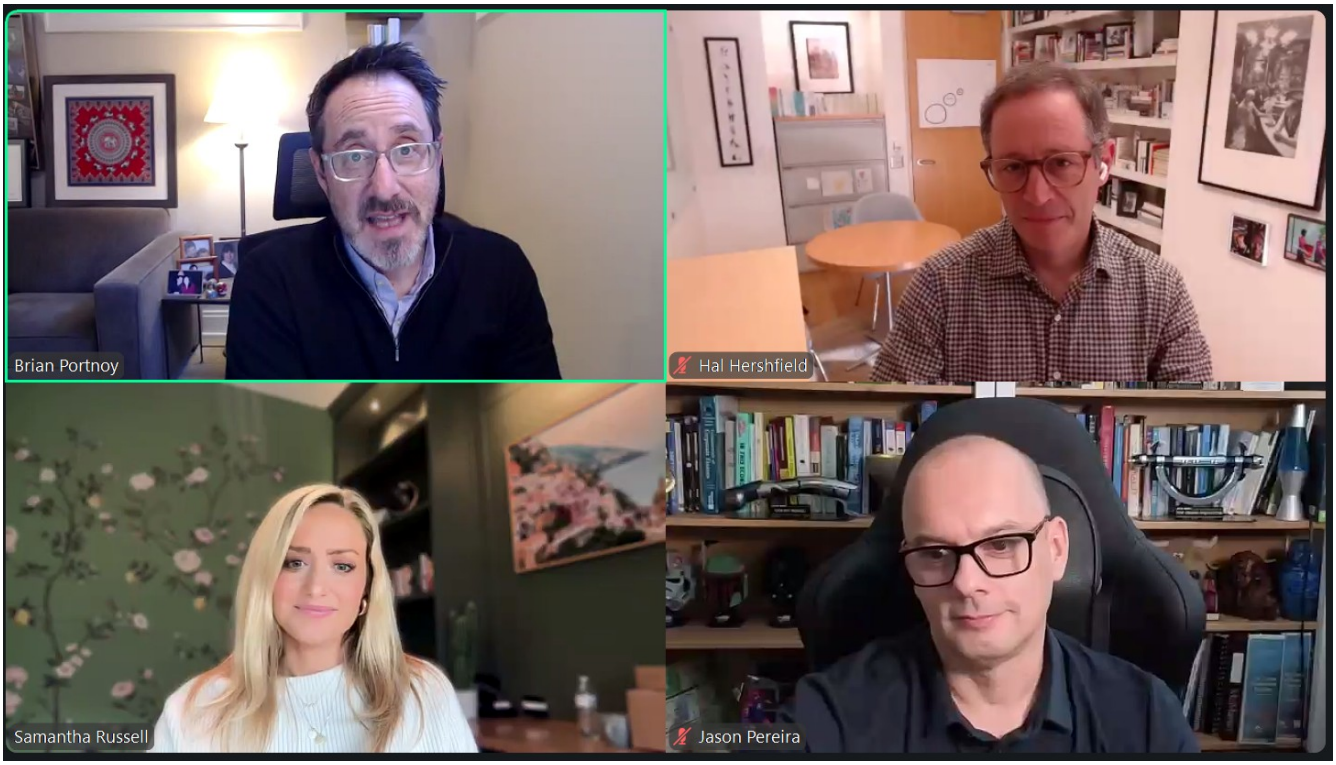

Clockwise from top left: Brian Portnoy of Shaping Wealth, Hal Hershfield of UCLA's Anderson School of Management, Jason Pereira of Woodgate Financial, and Samantha Russell of FMG.Courtesy photo
Advisors who try to appeal to everyone may end up resonating with no one.

Advisors who market to everyone may connect with no one
By Rob Burgess
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That was a key takeaway from a Thursday webinar hosted by Brian Portnoy, founder of Chicago-based behavioral finance consultancy Shaping Wealth, featuring members of the firm's advisory board: Jason Pereira, senior partner and financial planner at Woodgate Financial in Toronto; Samantha Russell, chief evangelist of FMG; and Hal Hershfield, professor of marketing, behavioral decision making and psychology at UCLA's Anderson School of Management.

The consensus: Advisors should focus less on chasing every shiny object and more on the human side of the business.

"If you're going to work on skill sets now … what you should be doing is asking, 'How can I give deep and meaningful purpose to a certain type of client?'" Pereira said. "Because you can't serve everybody."

The medium is the message

Russell highlighted the importance of addressing what she calls the "visibility crisis."

In years past, someone searched Google for "best advisor near me" and scrolled through the list of results. Now, most Google searches start with an AI overview and often end without a click-through. Consumers are also increasingly turning to AI chatbots and social media platforms for information on financial advisors.

One way advisors can stand out, Russell said, is by producing short-form videos.

"It is by far the most wanted type of media," she said. "You can invite a subject matter expert to join you … and then you can dice and cut up that video into snippets which you then share."

AI search also strongly favors recent content, she said, so content published within the last quarter ranks highly. Press releases in particular published on advisor websites tend to rank well in AI search results.

"They love it," she said. "They source it all the time as an authoritative piece of content."

Producing targeted, meaningful content

The more specific advisors can be with their content, the more appealing they become, panelists said.

"If we really want to connect with people, then we need to do that next layer of work to think, 'OK, what is meaningful to this subgroup? Who is the segment that I'm trying to target?'" said Portnoy.

Hershfield illustrated this with what he calls the "type of tea problem," a concept he brings up in the MBA marketing class he teaches.

"There are people who love hot tea, and there are people who love iced tea," he said. "The marketer's mistake is, there's a segment for hot tea, there's a segment for iced tea, there's got to be a segment for tepid tea. Nobody actually drinks tepid tea. We always talk about this when people are like, 'I found something that's a hybrid,' and it's for no one."